

SERVICE AGREEMENT CHECKLIST

Service agreement sections	Did the service agreement answer my question? (Can answer 'yes/no' below or make notes)
Service description	
What is the service to be provided?	
What is the effective date?	
Who are the professionals involved (e.g., credentials, students)?	
What is the service delivery model (e.g., consultation, tiered service delivery)? Are there supervision requirements for staff?	
Information on how this service is done and why it is important to me?	
Are there additional supporting documents to consider (e.g., CVs, references, research, reports)?	
What are the contracted hours per week or per month?	
Roles and responsibilities	
What are the roles and responsibilities of staff?	
What are the roles and responsibilities of the individual (e.g., attendance)?	
What are the roles and responsibilities of the caregivers (e.g., parent training)?	
Professional practices (i.e., rules under professional college or certification board, rules that must be followed under Ontario law)	
What are the professionals' requirements under their respective regulatory colleges or certification board?	

What are the professionals' privacy obligations under Ontario Law?	
How is documentation stored and for how long are client documents kept?	
What are the limits to confidentiality?	
Business practices	
Where is the service provided and how is this determined?	
What are the business hours?	
What is the contracted schedule and when are the client's breaks?	
Is there flexibility in scheduling?	
Is there before and after care available?	
What are the drop-off policies (e.g., drop-off lane, park and bring child in, alternative person for drop-off)?	
Can parents observe sessions?	
How are staff assigned to clients?	
Are there any company shutdowns (e.g., winter break, march break)?	
What are the sick policies?	
What are the stat holiday policies?	
What are the vacation policies?	
How is clinical documentation gathered (e.g., paper, electronic, parent portal)?	
How is progress evaluated (e.g., regular meetings, data and graphing, anecdotal notes, parent portal)?	
What are the fees per role?	

When is payment due?	
How is payment to be made (e.g., credit card, debit, cheque, e-transfer, pre-authorized payment)?	
What are the policies for declined payments or NSF cheques?	
What are the policies and fees, if any, for late payment?	
Are there additional fees (e.g., emails, phone calls, travel time, materials, KM)?	
Are there non-compete clauses?	
What are the policies on how and when to communicate with staff?	
Is there flexibility in scheduling?	
What are the policies on changing the schedule (e.g., notice period, request process)?	
What are the policies on photographs and video recording?	
What are the policies on sharing of information?	
Termination clauses	
When and how are discharge or transition out of service determined (e.g., when goals are met, if services is not effective, nonpayment of services)?	
What notice is required for termination from client and/or caregivers?	
What notice is required for termination of services from service provider?	
Will the provider support the client in their transition out of this service and into their next endeavor?	